



MLC AdviserOnline

Quick reference guide

March 2021



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Get started

Logging on

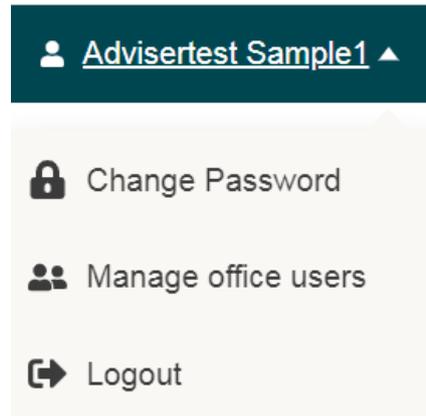
1. Go to **mlc.com.au** and click **Login**.
2. Enter your username and password and click **Login now**.
3. You'll be taken to your MLC AdviserOnline desktop. When your clients login following the same steps above, they'll be taken to their portfolio.

If you or your client have forgotten your password, you can reset it online by visiting **mlc.com.au/login** and clicking **Forgot your password?**

Changing your password

You should change your password regularly, and immediately if you think someone knows it.

When you change your password, it will apply to all of your adviser login details.



4. Click the **Options** button, located near the top right of the page and select **Change password**.
5. Enter your current password.
6. Enter and confirm your new password.
7. Click **Change password**.

Logging off

To exit the secure site of **mlc.com.au** you need to click on the **Options** button, located near top right of the page and select **Logout**.

Help centre

The Help centre lets you and your clients to search for answers to frequently asked questions. You can also rate the answers we provide to your questions.

Your adviser desktop

1. Navigation tabs

Move quickly and easily to the section you need.

2. Reports

Generate an extensive range of reports on your clients.

3. My business

Manage your business using our reports, client data exchange service and update your details.

4. Change password

5. Search

Type your client's name into the search bar, or use the search filters to access an extensive range of search options.

6. Apply online

Setup your client's MLC MasterKey or MLC Insurance products here.

7. Work tracker

Displays transactions and interactions for all your clients. This includes the status of applications and transaction progress.

8. Online transactions

Displays submitted online transactions, including client-initiated transactions.

9. Upload documents

Efficiently upload and submit documents to us online.

10. Client leads

Displays your five most recent leads.

11. Document library

Access important information about your MLC MasterKey and MLC Insurance clients.

12. Forms & brochures

Find all our forms and brochures in one place.

The screenshot shows the MLC AdviserOnline desktop interface. At the top, there are navigation tabs: Home (1), Reports (2), Products, Technical, Resources, My Business (3), and My licensee (4). The user profile 'Steele Graboski' is visible in the top right. The main content area is titled 'WELCOME TO ADVISERONLINE'. Below this, there is a 'Client search' section (5) with a search bar and filters. To the right is an 'Apply online for:' section (6) with a link to 'MLC MasterKey'. The main dashboard features several tiles: 'Work tracker' (7) for viewing transactions, 'Online transactions' (8) for viewing submitted transactions, 'Upload documents' (9) for submitting documents, 'Client leads' (10), 'Document library' (11), and 'Forms and Brochures' (12). A 'Coronavirus support' section is also present. On the right side, there are links for 'MLC WRAP & Navigator' (13), 'MLC EasyOrder', 'Fund profile tool - Wrap/Navigator', and 'Fund profile tool - MLC MasterKey'. At the bottom, there is a 'Tools & quick links' section (15) with links for 'My News' (14), 'Age pension calculator' (15), 'Performance & pricing', and 'MLC revenue calendar' (16).

13. MLC Wrap super solutions

Access general information on your client's MLC Wrap and Navigator products.

14. My News

Easy to read content and insights that matter to your business.

15. Age pension calculator

A quick link to Age pension calculator.

16. MLC Revenue calendar

Searching for clients

1. Client search

- Go to your Home page.
- Enter client details in **Client search**.
- Your search results will display.

Search results will only display if there's more than one result. If there's only one result, you'll be taken to either your Client's profile or Plan profile page.

2. Search filters

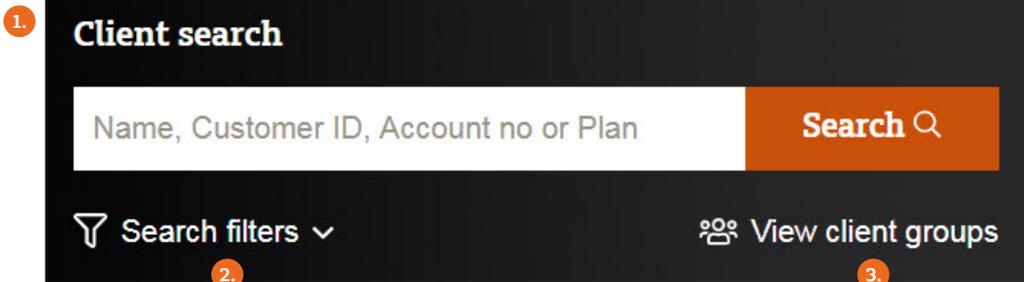
You can also use search filters to refine your search.

3. View client groups

- To access **Client groups**, select **View client groups**. This will open the My group clients screen.
- **Client groups** lets you create reports for multiple clients or groups of clients in pdf or spreadsheet formats.

4. Recent clients menu

You can quickly access the last five clients or business super plans you viewed by clicking on the **search bar**.



Client activities

Work tracker

My Work Tracker lets you view and track the progress of requests that have been sent to MLC for your clients. Comprehensive updates are available daily on the progress of your clients requests, including:

- New business applications;
- Account enquiries;
- Investment switches; and
- Withdrawals.

Online transactions

My transactions, which is launched by clicking **Online transactions**, displays all transactions submitted online.

Transactions submitted by you, your clients and tasks processed by us are all displayed. You can see drafts, scheduled, submitted and cancelled requests. You can also view and delete pdfs of transactions.

The screenshot shows the MLC AdviserOnline dashboard. At the top, there is a navigation bar with 'FAQs', 'Contact us', a search icon, and a user profile for 'Steele Graboski'. Below this is a main menu with 'Home', 'Reports', 'Products', 'Technical', 'Resources', 'My Business', and 'My licensee'. The main content area is titled 'WELCOME TO ADVISERONLINE' and features a 'Client search' section with a search bar and 'Search filters'. To the right, there is an 'Apply online for:' section with a link to 'MLC MasterKey'. Below these are three main action buttons: 'Work tracker' (circled in orange), 'Online transactions' (circled in orange), and 'Upload documents'. The 'Work tracker' button description is 'View transactions and interactions for all your clients'. The 'Online transactions' button description is 'View online transactions submitted by you or your clients'. Below these buttons are several other sections: 'Client leads', 'Document library', 'Forms and Brochures', 'Coronavirus support' (with a sub-description about COVID-19 toolkit), 'MLC WRAP & Navigator', 'MLC EasyOrder', 'Fund profile tool - WrapNavigator', and 'Fund profile tool - MLC MasterKey'. At the bottom, there is a 'Tools & quick links' section with four items: 'My News', 'Age pension calculator', 'Performance & pricing', and 'MLC revenue calendar'.

Reports

Reports

Access our professional, detailed and easy to customise reports for individuals and group clients.

Click **Reports** followed by **New report** to generate a report for your client(s). Search for your client, select the report type, then a date range and click **Confirm**. Alternatively, you can also access reports for specific clients by clicking on **Portfolio review** from your client's profile.

Reports will be available to view online for 7 days.

Adviser Documents Online

To access important information about your MLC MasterKey, Business Super clients, click **Document library**.

Client specific reports

On the **Client** portfolio page, you can view client specific reports under **Reports** on the right panel. This shows up to five reports run in the last seven days.

You can access the Portfolio review and Portfolio snapshot report for your client.

FAQs Contact us

MLC Home **Reports** Products Technical Resources My business My licensee

< Back to home

ADVISER ONLINE

My report centre

Search for

All reports (74) [Show all](#)

New report

Report Type	Client	Date	Availability
Portfolio review	Sam Sample	10 Mar 2017 03:39:30 AM	Available for 7 days
Portfolio review	Sam Sample	10 Mar 2017 03:37:16 AM	Available for 7 days
Portfolio review	Sam Sample	10 Mar 2017 03:37:01 AM	Available for 7 days
Portfolio review	Sam Sample	10 Mar 2017 03:36:39 AM	Available for 7 days
Group Report	All Clients	09 Mar 2017 02:40:02 PM	Available for 7 days
Portfolio review	Sam Sample	09 Mar 2017 03:40:45 AM	Available for 6 days
Portfolio review	Sam Sample	09 Mar 2017 03:40:41 AM	Available for 6 days

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Your client's profile

1. Portfolio snapshot report

Open a detailed view of a client's account as a PDF.

2. Portfolio review

Generate reports for your client's portfolio.

3. New MLC MasterKey account

Setup a new MLC MasterKey account for your client.

4. Online transactions

Displays your client's submitted, draft, scheduled and canceled online transactions.

5. Client details

View and update your client's contact details.

6. Find my super

Search and consolidate your client's other super to MLC.

7. Reports

View your client's most recently generated reports.

FAQs Contact us

MLC Home Reports Products Technical Resources My Business My licensee

7.

ALLEN ANALYST

2. Portfolio review Portfolio snapshot report Statements & letters

Investments, super and retirement

MasterKey Super Fundamentals Account 95695959591 \$80,654.22

Consolidate your other super into your account

Contribute to your super add money to your super account

Switch how your money is invested

Other transactions

Balance Account details Transaction history

Investment Option	Percentage	Amount
MLC Horizon 7 - Accelerated Growth Portfolio	19.83%	\$15,991.17
MLC Cash Fund	64.50%	\$52,022.82
Vanguard Australian Shares Index Fund (closed)	15.67%	\$12,640.23
Total	100%	\$80,654.22

Download data

More detail >

3. New account Total account balance \$80,654.22

Client activities

4. Online transactions Work tracker

Date	Product	Transaction type	Status	Owner	Actions
No online transactions can be found.					

View all

5. ALLEN QCFBMLJF

Personal details

Home 17432784

Email 054306701@0E2F81C.com

Street address Not supplied

Preferences

TFN & ABN

Other details

Reports

Report Expires in

There are no reports available

View all

6. Find my super

We have your consent to use your Tax File Number to find your super. You can [revoke your consent](#) at any time. See [Terms and Conditions](#).

Find my super

Tools

Forms & brochures

Unit prices & performance

Fund profile tool

MLC EasyOrder

MLC Revenue Information

MLC On Track Toolkit

Consolidate your super

Request an insurance quote

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Last login: 14 Apr 2020 02:00 pm

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Your client's profile in more detail

Your client's profile displays all of their accounts; investments, super and retirement.

Click on their account to view more details, including their account/ policy details, balance by investments, transactions and insurance benefits.

Investments, super and retirement
▲

MasterKey Investment Service Fundamentals

Account 99999999997

\$11,341.64

Additional investment

add money to your investment account

Switch

how your money is invested

Update

your draw down strategy

Other

see other transactions

< Balance
Account details
Transaction history
Tax summary >

Investment Option	Percentage	Amount
<div style="width: 15px; height: 15px; background-color: #e67e22; margin-right: 5px;"></div> MLC Cash Fund	4.62%	\$523.52
<div style="width: 15px; height: 15px; background-color: #e91e63; margin-right: 5px;"></div> Vanguard Australian Shares Index Fund (closed)	95.38%	\$10,818.12
Total	100%	\$11,341.64

Download Data

More detail >

MasterKey Pension

Account 99999999993

\$369,161.31

MasterKey Pension Fundamentals

Account 99999999998

\$885,010.84

MasterKey Business Super

Account 029999999

\$211,589.56

Transacting on your client's account

Clicking on your client's account or policy will reveal a list of available transactions and requests that you can submit to MLC. The transactions displayed are applicable to the product and include:

- Super consolidation - Manually enter the details of the super fund as the ATO search function is not available to advisers
- Additional contributions and investments
- Investment switching
- Updating draw down strategy
- Pension payment

 **MasterKey Super Fundamentals** **\$10,961.24**
Account 99999999998

 Consolidate your other super into your account	 Contribute to your super add money to your super account	 Switch how your money is invested	 Other see other transactions
--	--	---	--

Add Investment Protection	Add MLC MasterKey Investment Protection
Draw down strategy	Change how your fees are paid
Future investments	Change how your future money is invested
Recurring switch	Request monthly or quarterly investment switches
Upload documents	Upload your clients' documents to MLC

Updating your client's contact details

Your client's contact details can be viewed and updated in the right hand side panel of their client profile.

As an adviser, you can update your client's:

- Name and date of birth
- Phone numbers
- Email address
- Street and postal addresses
- Foreign residency for tax purposes (investment customers only)
- Occupation type

In addition, you can view, but not update your client's:

- Statement delivery preference
- Tax File Number

 **SAM SAMPLE**

Personal details 

Name Sam Sample
Date of birth 24-Mar-1958 [Edit](#)

Home 02 12345678
Business 02 12345678

Email
platform_online_services@mlc.com.au [Edit](#)

Street address
123 Smith Street
Sydney NSW 2000
2000

Postal address
123 Smith Street
Sydney NSW 2000
2000 [Edit](#)

Customer no 999999999

[View summary](#)

Preferences 

TFN & ABN 

Other details 

Reports 

Icon glossary



Investment, Superannuation and Pension

Within each of these categories the products will be displayed in alphabetical order. Closed accounts will be displayed at the bottom of the category.

You'll only be able to see accounts you service. The total account balance is the sum of only the displayed accounts. Any account you no longer service will be removed from the section.

Accounts available to view online include:

MLC MasterKey Super / Fundamentals, MLC MasterKey Pension / Fundamentals, MLC MasterKey Investment Service / Fundamentals, MLC MasterKey Unit Trust,

MLC MasterKey Business Super, MLC MasterKey Personal Super, MLC MasterKey Rollover, MLC MasterKey Superannuation Gold Star (non-TUSS) (SMSFs), MLC MasterKey

Investment Bonds, MLC MasterKey Superannuation, MLC MasterKey Allocated Pension, MLC MasterKey Term Allocated Pension, and MLC MasterKey Annuity.



Joint accounts will be displayed using this icon beside the product name.



Indicates your client submitted an online request.



Indicates you submitted an online request.



Indicates we cancelled an online request.



**For more information
call us on 133 652**

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North Sydney NSW 2060

mlc.com.au